OPERATIONAL SERVICES DIVISION

Job Aid:

How to Create a Grant Posting from Scratch

This Job Aid shows how to:

- Create a Grant From Scratch in COMMBUYS

Of Special Note:

All state agencies are subject to 815 CMR 2.00, State Grants, Federal Grant Awards, Federal Sub-grants and Subsidies as well as the Office of the Comptroller's policy on State Grants, Federal Sub-Grants and Subsidies. Departments must use COMMBUYS to publicly post the availability of a discretionary Grant or Grant Program and publish the results of grantee selections. Use of COMMBUYS to receive electronic quotes for grant opportunities is optional; however, state agencies are encouraged to require grantees to register and submit quotes (applications) through COMMBUYS, which provides a central repository for receipt of electronic applications. As more grantees use COMMBUYS to identify grant opportunities, they will have a single location to apply for grants from multiple state agencies, resulting in efficiencies for both the grantees and the state agencies.

Bids (Grants) are documents used to request responses (quotes) from potential Grantees. This job aid will start at the point of creating a new bid for posting Grants, which is a very similar process to posting any other bid document.

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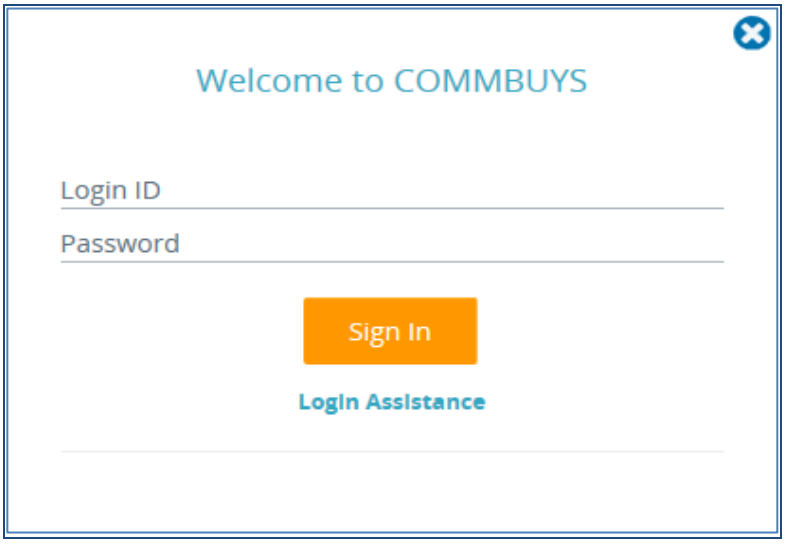
Step	Action
	Step 1: Accessing the COMMBUYS Landing Page 1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking on the hyperlink COMMBUYS. 2. Click on the orange **Sign In** button in the upper right hand corner. 3. Enter your Login ID and Password and click on the **Sign In** button.
	

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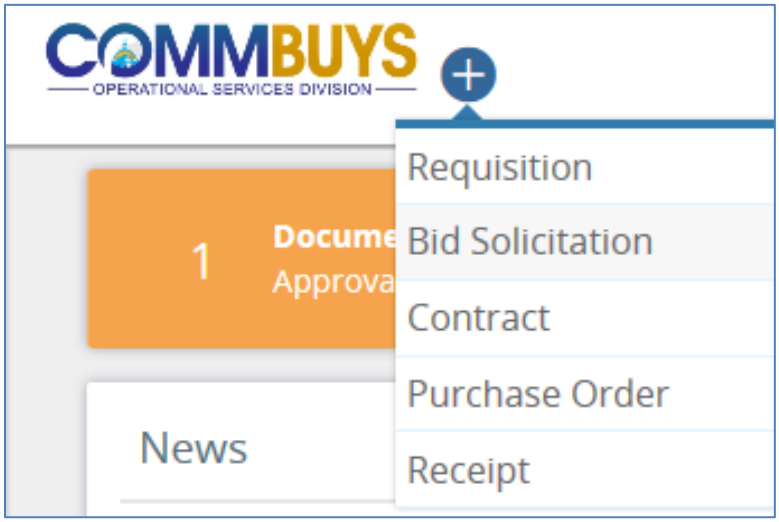
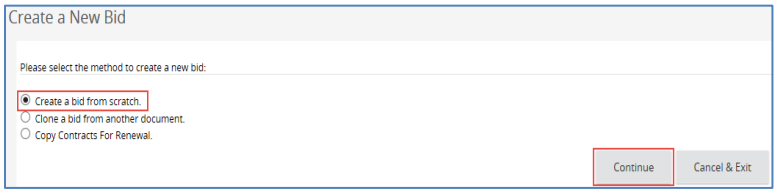


Step 2: Creating a New Bid

1. Click on the **Add Documents** (plus sign) icon.
2. Select **Bid Solicitation** from the dropdown menu.



Step 3: Creating a New Bid From Scratch

1. Ensure that the **Create a bid from scratch** radio button is pre-selected.
2. Click the **Continue** button**.**

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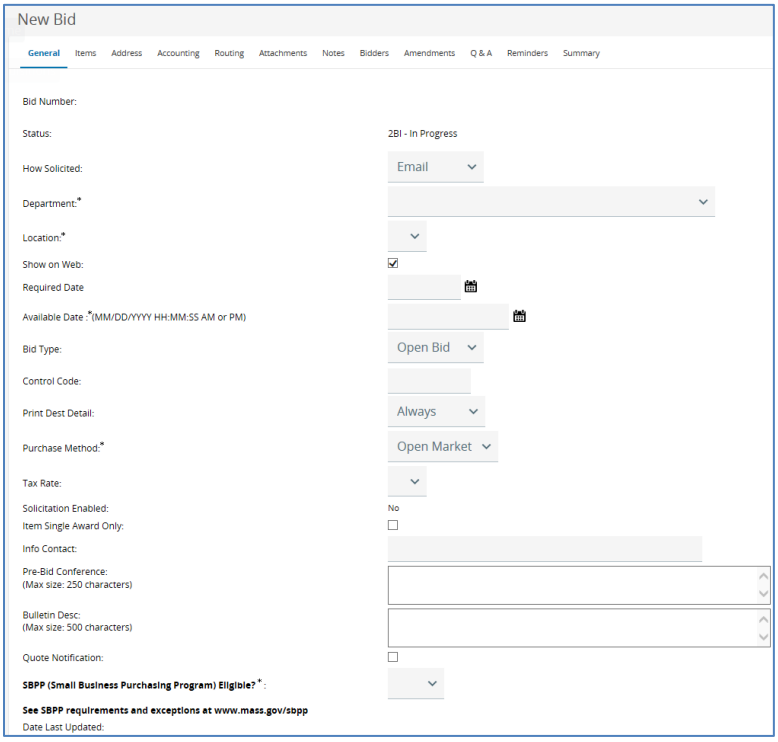

Step 4: Completing the Left Side of the New Bid Screen

The New Bid screen opens to the General tab. On the left side of the screen, fields with an asterisk are required. They are:

- **Department**: This defaults from the user profile. It may be changed using the dropdown if other departments are available to the user.
- **Location**: This defaults from the user profile. It may be changed using the dropdown if other locations are available to the user.
- **Available Date**: The date a Grantee is able to open and download the Grant application and other documents. Grantees can also begin to enter online responses at this time. For Grant Notices of Intent to Award, the date would be the date of the Notice.
- **Purchase Method**: Select **Blanket** then input two additional fields that display.
    - **Blanket Begin Date:** The anticipated beginning date of a contract or award. Click on the calendar icon to select the blanket start date.
    - **Blanket End Date:** displays on the right side of the screen (see Step 5).
- **SBPP** (**Small Business Purchasing Program) Eligible?:** Select "Yes" if up to $150K or "No" if over $150K.

Optional fields include:

- **Info Contact:** The contact person for this bid.
- **Pre-Bid Conference:** This field is available to capture bid conference information if applicable.
- **Bulletin Description:** This field is available for a brief description of the bid and how it will display.

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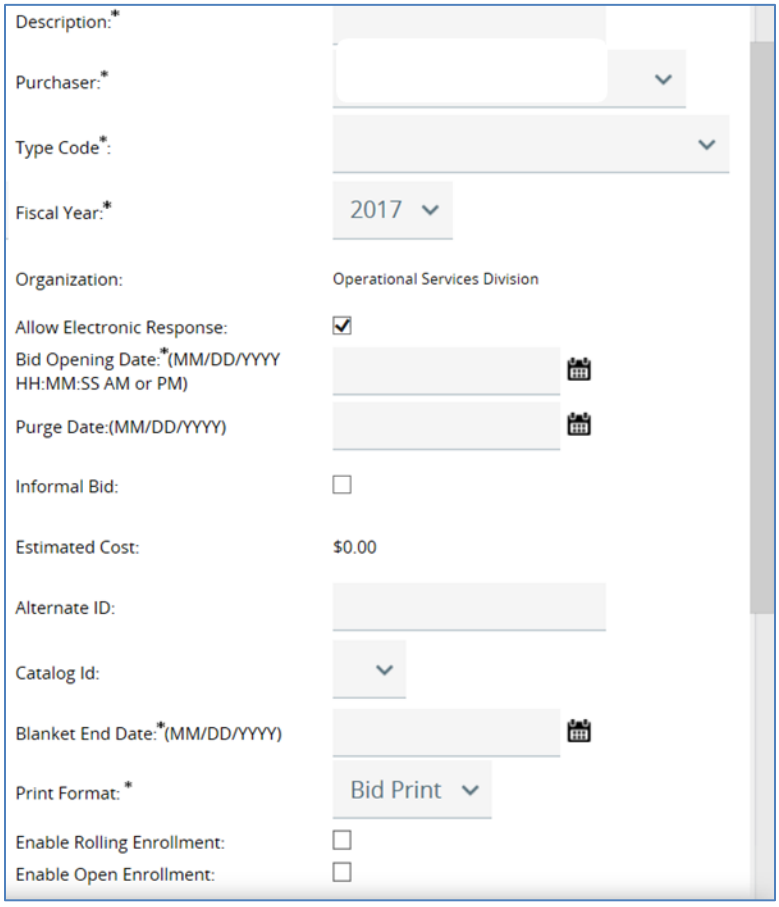


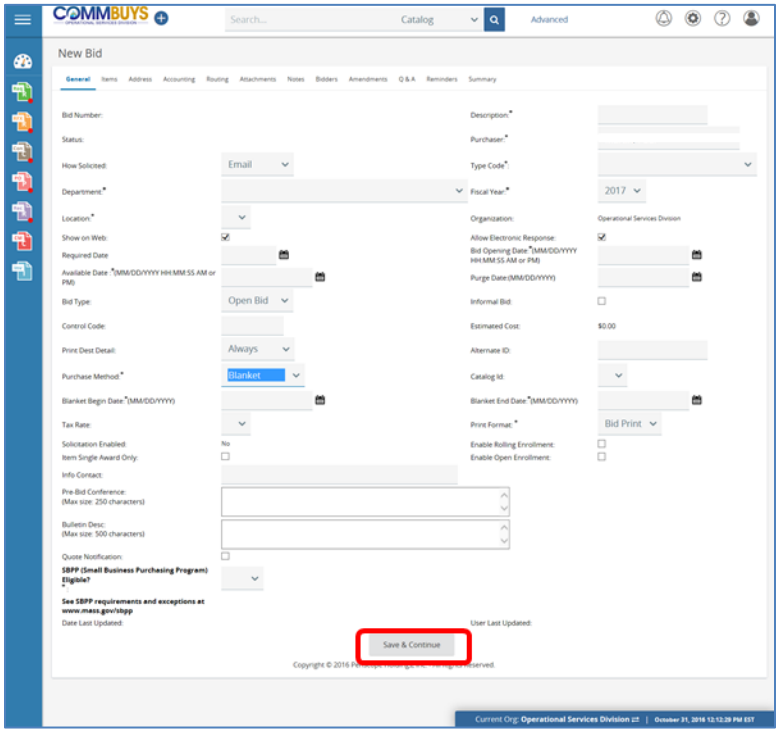
Step 5: Completing the Right Side of the New Bid Screen

All fields with an asterisk are required. The required fields are:

- **Description**: Must include the title of the Grant (the word "Grant" must be included in the title) and any other identifiable information.
- **Purchaser**: This defaults to your name. Use the dropdown to select a different purchaser.
- **Type Code**: Select **NS** (non-statewide solicitation).
- **Fiscal Year**: This field defaults to the current Fiscal Year. Use the dropdown to select a different year if appropriate.
- **Bid Opening Date**: The date selected on the Grant when the response period is closed to the respondent. COMMBUYS will no longer accept quotes and the Grantor will be able to open and view the quotes. For Grant Notices of Intent to Award, the date would be the final date for any challenges to be filed related to the Notice.
- **Blanket End Date**: The anticipated ending date of a contract or award. Click on the calendar icon to select the blanket end date.
- **Print Format**: Leave Bid Print as the default.

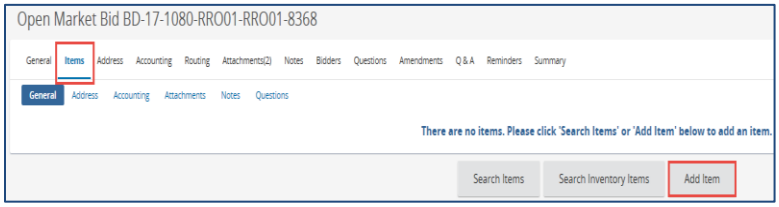
Optional fields include:

- **Allow Electronic Response:** Check this box if the Grantees are submitting their applications as electronic quotes within COMMBUYS. If there is an alternate application submission method, uncheck this box. For Grant Notices of Intent to Award, this box would be unchecked.
- **Purge Date: DO NOT USE.**
- **Informal Bid:** If selected, Commonwealth users can see the submitted Grantee quotes before the bid opening date (Grant Response Deadline).



Once all the required fields are completed, click on the **Save & Continue** button.

NOTE: You will receive a general validation error notice letting you know that you need to add items to your bid.



Step 6: Opening the Items Tab

1. Click on the **Items** tab.

   You are on the General sub tab within the Items tab.

2. Click on the **Add Item** button.

Step 7: Adding Items

The Items tab page opens to allow you to add an Item or narrative item to the bid. The following required fields must be completed for an open market item:

- **Item #:** Automatically issued by COMMBUYS.
- **Item Type**: Select one of two options in the dropdown menu:
  - Normal, the default value,
  - Narrative, which permits

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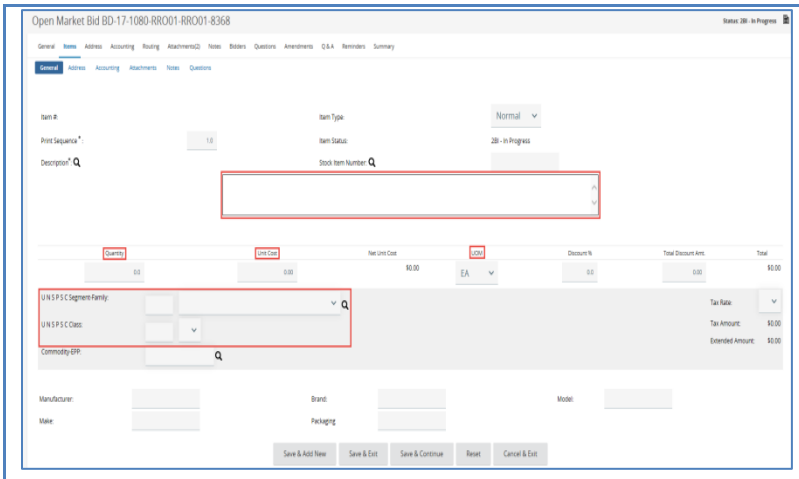

the addition of a non-item to allow an additional description to appear on the bid.

- **Print Sequence #:** Change this auto-filled field if the order of the bid line items should print in a different order from the Item number order.
- **Description:** Enter a complete description of the grant, eligibility or Notice of Intent to Award.
- **Quantity:** Enter the quantity if known or enter **1** if unknown (most often used for grants).
- **Unit Cost:** Enter the cost of the product or service per 'unit' of quantity. Enter 1.00 or leave blank if unknown.
- **UOM**: Select the unit of measure (UOM) - how the item is sold, packaged, or purchased - from the dropdown menu.
- **UNSPSC:** Use the UNSPSC Grant Opportunity Code which is 00-00-00. All grants can be found under this code and it should be used in addition to other codes you choose to identify the required service.

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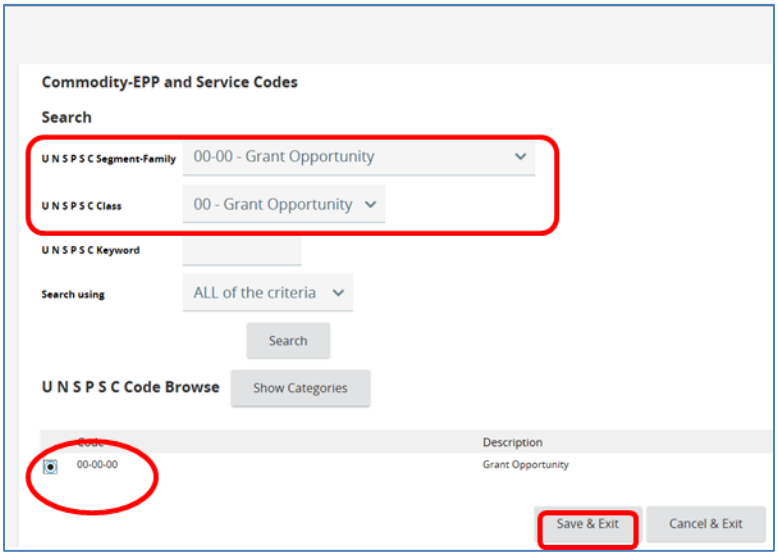
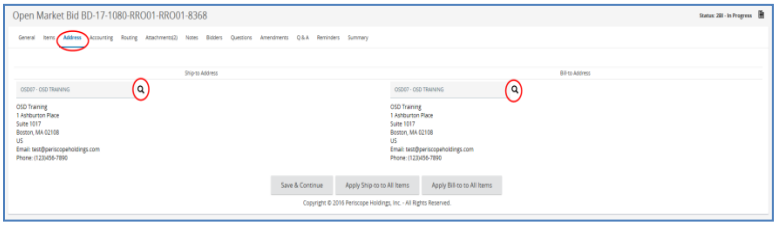


Step 8: Adding UNSPSC Codes

Click on the dropdown arrow next to the **UNSPSC Segment-Family** field.

1. Select **00-00 Grant Opportunity** from the dropdown menu.
2. Click on the dropdown arrow next to the **UNSPSC Class** field.
3. Select **00 Grant Opportunity**.
4. Click the radio button next to **Code 00-00-00**.
5. Scroll to the bottom of the screen and click on the **Save & Exit** button to save and return to the Items tab. Add as many items as required for the Bid by clicking the **Save & Add New** button.
6. Click on the **Save & Exit** button once finished with all required bid items and the Items General tab redisplays.



Step 9: Reviewing Addresses

1. Click on the top level **Address** tab.
2. The Address page should prefill. Update the Address page by clicking on the magnifying glass if items are being shipped to, or billed to a different address than the default.
3. If no change is required go to Step 10.
4. If there is an error message indicating that no valid ship-to address exists, click on the magnifying glass icon to select a Ship-to address.

NOTE: If you want the option to ship to multiple addresses, go back to the Items tab and select the Address sub tab.

NOTE: Organization Administrators (OAs) maintain the Ship-to and Bill-to addresses. To update or add additional addresses to the system, contact your OA.

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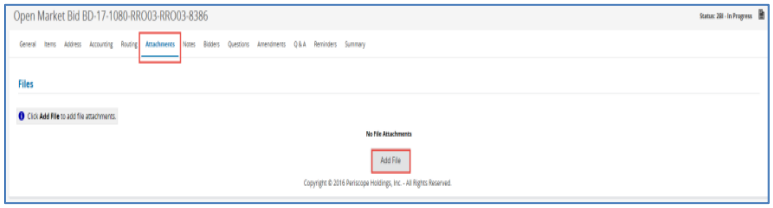


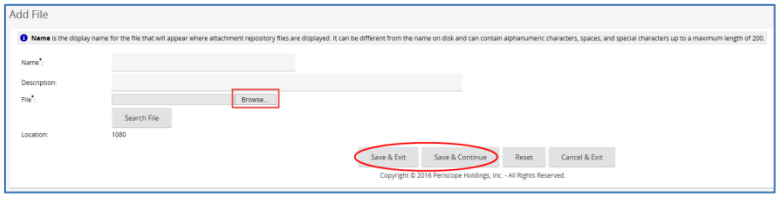
Step 10: Adding Attachments

NOTE: The Accounting tab is not currently used in COMMBUYS. The Routing tab is not activated until after you submit it for approval.

1. Click the **Attachments** tab. If any files auto-attach, review, keep, or delete as necessary. Attachments include the grant application and required forms/contract documents.

   For Notice of Intent to Award, the Notice and any supporting information should be posted as attachments.

2. Click the **Add File** button to add a new file.



Step 11: Browsing and Selecting a File

1. When the Add File window opens, click the **Browse** button (also known as the **Choose File** button in Google Chrome). This will search for documents from your computer.

2. Click on the desired file from the popup window and click on the **Open** button to add.

3. Complete the following fields:
   - **Name** – required; but will be populated with the selected file name if left blank.
   - **Description** – optional.

4. Click on the **Save & Continue** button to add another file, or click on the **Save & Exit** button when all files have been added.

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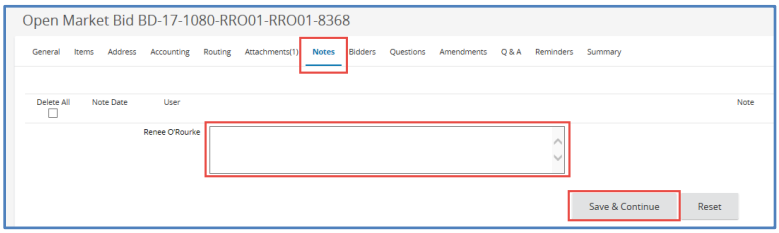
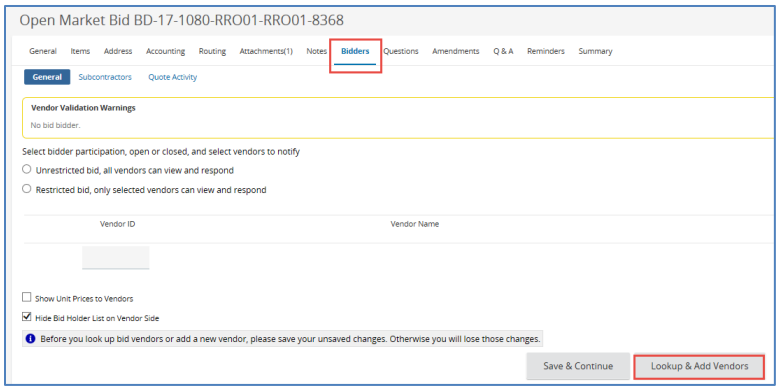
Step 12: Adding Notes



1. Click on the **Notes** tab if you would like to add a note. Notes are viewable only by Commonwealth users. Vendors cannot access or view these notes.

2. When complete, click on the **Save & Continue** button.

Step 13: Adding Vendors



1. Click the **Bidders** tab.

2. When the Bidders screen opens, click on the **Lookup & Add Vendors** button at the bottom of the page.

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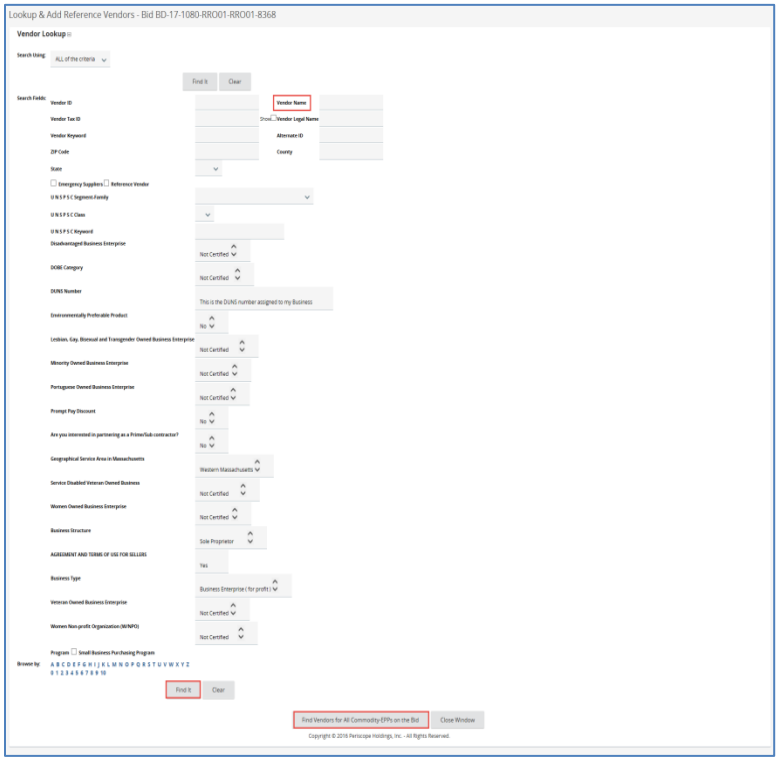

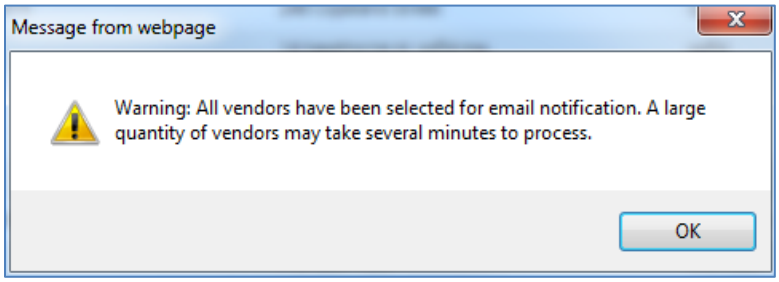

Step 14: Searching for Vendors

1. The Lookup and Add Reference Vendors popup window appears. <u>This should be used ONLY to select non-public entities if they are eligible to respond to the grant opportunity.</u>

2. Click the **Find It** button.

3. Alternatively, scroll to the bottom of the page and click **Find Vendors for All Commodity-EPP on the Bid** button.

COMMBUYS automatically matches the vendors who have registered with the associated UNSPSC codes. These vendors will receive an email notification of the bid.

4. Select the desired vendor(s) from the search results by clicking on the checkbox next to the vendor name, or click on the top Select checkbox to select all vendors on the list.

5. A popup window displays with a warning message when selecting all vendors. Click **OK**. The popup window will disappear.

6. Scroll to the bottom of the page and click the **Save & Exit** button to return to the Bidders tab.

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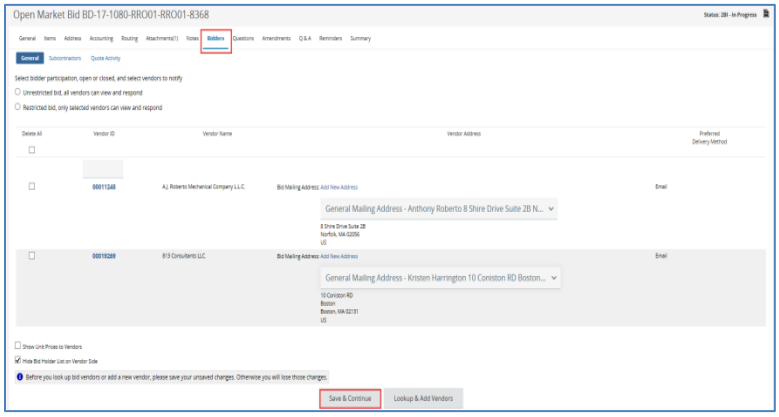


Step 15: Adding and Deleting Vendors

The **Bidders** tab now displays all the Vendors you selected with the same UNSPSC as the grant.

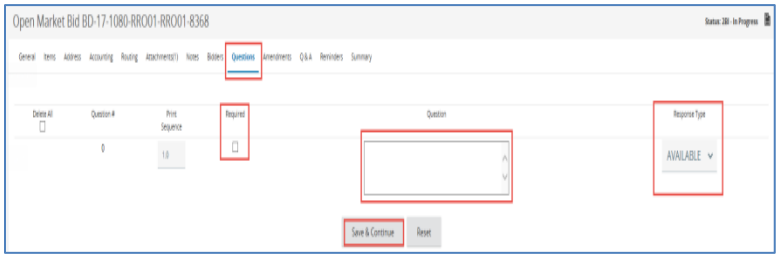
1. You can delete vendors using the checkboxes in the left **Delete** column or delete all vendors by selecting the top **Delete All** checkbox at the top of the column.

   NOTE: Deleting vendors means that the bid is no longer unrestricted. Refer to OSD and your department policy for guidance.

2. You can continue to add Vendors by clicking the **Lookup & Add Vendors** button.

3. When you are done, click the **Save & Continue** button.

NOTE: Click on the Unrestricted radio button for grants so that any vendor can respond to the bid. Click on the Restricted radio button ONLY for grants where all eligible Grantees are confirmed as registered vendors in COMMBUYS. This step needs to be done after you select your vendors. If done prior, it will de-select and not be saved. Click **Save & Continue** when complete.



Step 16: Entering Questions

1. Click on the **Questions** tab.

2. You can ask vendors questions by entering text in the **Question** field.

3. Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor.

4. Select a value from the **Response Type** dropdown menu to establish a format for the vendor response.

5. Click on the **Save & Continue** button to save your entries.

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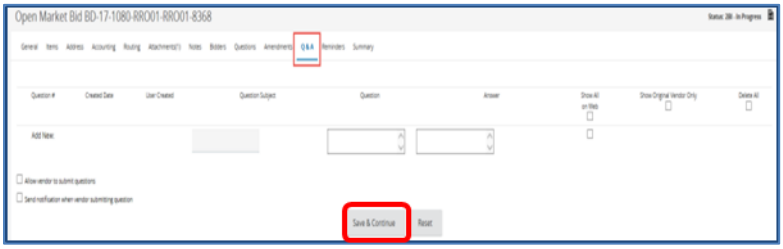

Step 17: Opening Q&A Dialogue

NOTE: The Amendments tab is not activated until after the bid is sent.

1. Click on the **Q&A** tab.

2. To allow dialogue with vendors, select the **Allow vendor to submit questions** checkbox.

3. If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.

4. If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.

5. If you wish to display the dialogue on the Web, select the **Show All on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate – refer to OSD and department policy.

6. Click on the **Save & Continue** button.

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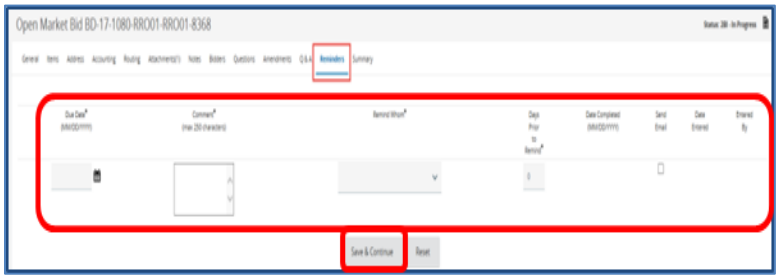
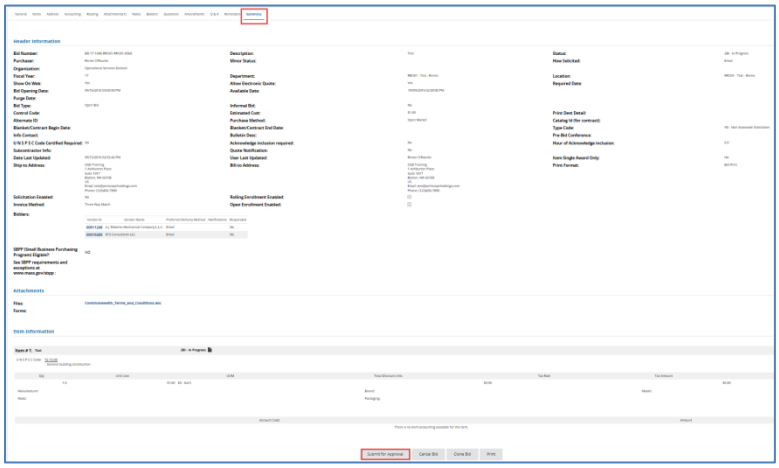
Step 18: Entering Reminders



1. Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization.
2. Use the calendar icon in the **Due Date** field to select the date of the reminder, and then enter your reminder text in the **Comment** field.
3. Select yourself or another internal recipient in the drop-down menu next to the **Remind Whom** field.
4. If an advanced reminder is desired enter a number in the **Days Prior to Remind** field.
5. If you would like to receive an email when your reminder is due, select the **Send Email** checkbox.
6. When complete, click on the **Save & Continue** button.

Step 19: Reviewing the Bid



1. Click on the **Summary** tab to review all of the entered data.
2. When finished, scroll to the bottom of the page and click on the **Submit for Approval** button.

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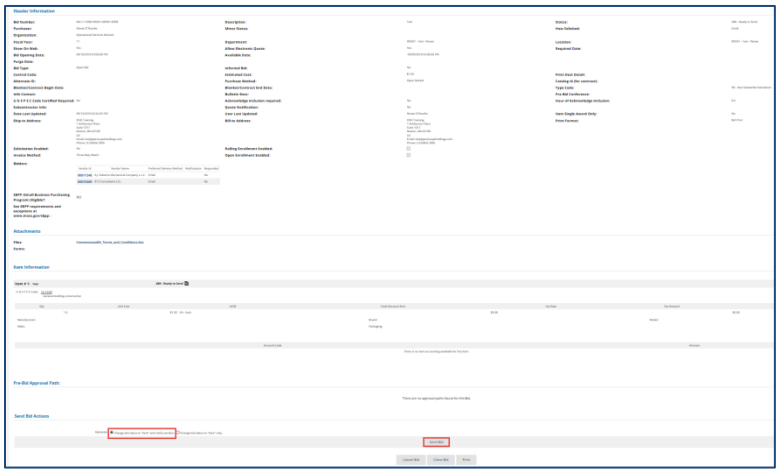
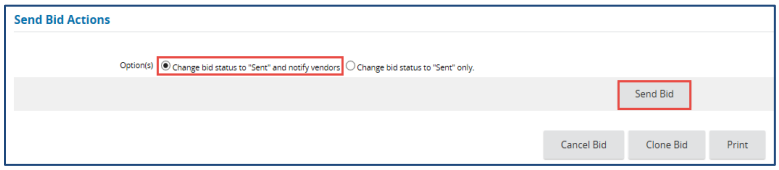
Step 20: Approval Path

The approval path is shown or you're given the option to select the appropriate one. Click on the **Save & Continue** button to complete.

NOTE: The bid will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS and continue with Step 22.

Step 21: Sending the Bid to the Vendor





1. Once approved, locate the bid.
2. Select either the **Change bid status to "Sent" and notify vendors** radio button or the **Change bid status to "Sent" only** radio button.
3. Click on the **Send Bid** button.

The bid is now posted on **COMMBUYS**. Vendors may be able to respond depending on the available date set on the General tab.